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**TO: W-2 Agencies
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**FROM: Janice Peters
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DWS OPERATIONS MEMO

No: 06-20

DATE: 05/10/2006

FS	<input type="checkbox"/>	MA	<input type="checkbox"/>	SC	<input type="checkbox"/>
CTS	<input type="checkbox"/>	CC	<input type="checkbox"/>	W-2	<input checked="" type="checkbox"/>
FSET	<input type="checkbox"/>	EA	<input type="checkbox"/>	CF	<input type="checkbox"/>
JAL	<input type="checkbox"/>	JC	<input type="checkbox"/>	RAP	<input type="checkbox"/>
WIA	<input type="checkbox"/>	Other EP	<input type="checkbox"/>		

PRIORITY: HIGH

**SUBJECT: Wisconsin Works (W-2) Move Placements Project – Conversion
Process**

CROSS REFERENCE: DWS Administrator's Memo 06-05

EFFECTIVE DATE: JUNE 5, 2006

PURPOSE:

The purpose of this memo is to provide information on the Client Assistance for Re-employment and Economic Support (CARES) conversion process that will run for existing W-2 cases when the W-2 Move Placements Project is implemented the weekend of June 2, 2006. This memo includes a description of the conversion process, instructions to prepare cases for conversion and a description of the reports that will be provided both before and after the conversion process.

BACKGROUND:

The purpose of the W-2 Move Placements Project is to move the existing CARES Worker Web (CWW) W-2 placement page (W-2 Information Page) out of Application Entry and into the

Work Programs subsystem in CARES. The primary reason for this change is to improve CARES support of W-2 policy and to simplify case processing when W-2 placement changes are made. This memo provides information about the Move Placements conversion processes. A separate Operations Memo will be issued outlining all of the changes included in the W-2 Move Placements Project.

PLACEMENT CHANGES PRIOR TO-CONVERSION

To avoid losing information during conversion, it is critical that Financial and Employment Planners (FEP) run eligibility, confirm the W-2 AG results, and process AIWP every time they make a placement change on the W-2 Information Page prior to conversion.

CONVERSION PROCESS

The conversion process will run for existing W-2 cases when the W-2 Move Placements Project is implemented the weekend of June 2, 2006. The conversion process has three goals:

1. Create the new W-2 Pre-Eligibility Requirements Page in CWW.
2. Convert the confirmed placement information from the W-2 Information Page in CWW to a new screen, WPWW (Wisconsin Works Information) in the Work Programs (WP) Subsystem.
3. Create accurate WP Referral information.

CREATING THE W-2 PRE-ELIGIBILITY REQUIREMENTS PAGE

The conversion process will convert the existing "FEP ID," "FEP INTERVIEW DATE," and "PRE-ELIGIBILITY REQUIREMENTS MET" information from the W-2 Information Page to the new W-2 Pre-Eligibility Requirements Page in CWW. Historical and current information converts for each W-2 sequence and each effective month within a sequence. Multiple entries for the same effective month will convert to one record on the W-2 Pre-Eligibility Requirements Page.

Example 1: On 4/28 a worker entered the "FEP ID" on the W-2 Information Page. On 5/3 the FEP enters the "FEP Interview Date" on the W-2 Information Page. On 5/8 the FEP entered "Y" for "Pre-Eligibility Requirements Met." After conversion, the W-2 Pre-Eligibility Requirements Page displays two records. One history record for 04/2006 displaying the "FEP ID" entry and one current record for 05/2006 displaying the "FEP ID," "FEP Interview Date," and "Yes" responses to both "Are there any pre-eligibility requirements?" and "Have the pre-eligibility requirements been met?"

W-2 Pre-Eligibility Requirements Page

CARES Worker Web - W-2 Pre-Eligibility Requirements

User ID: XCT548 User Name: P JANSSEN Quick Select: CASE/RFA

Primary Person: TINA ADAMS 36F PP Case: 6700387264 Status: Open Mode: Ongoing 05/02/2006

Navigation Menu

- CARES Worker Web
 - CARES Home
 - Search
 - Inbox Search
 - Client Registration (0)
 - Application Entry (0)
 - Case Summary
 - Case Information
 - Individual Demographics
 - Benefits/School
 - Individual Non Financial
 - Long Term Care
 - Asset Information
 - Employment / Unemployment Queries
 - Employment
 - Unearned Income
 - Expenses
 - Medical
 - W-2/Child-Care
 - W-2 Pre-Eligibility Requirements
 - W-2 Clocks Information
 - Manual CC Eligibility
 - CC Activity Status
 - Eligibility Access
 - Query
 - Worker Tools
 - CARES Mainframe Access

W-2 Pre-Eligibility Requirements

Effective Period

Begin Month: 12/2005 End Month: 03/2006 Last Updated: 03/04/2006

Delete Reason:

Additional Information

Sequence: 3

FEP Interview Date: 12/01/2005

FEP ID: XCT548 FEP Name: PATRICIA JANSSEN

Are there any pre-eligibility requirements? Yes

Have the pre-eligibility requirements been met? Y - Yes

Sequence Updated on or before

MM/DD/YYYY Go

Cancel Previous Next

The conversion process will convert the one response (Yes/No/Waived/?) from the “Pre-Eligibility Requirements Met” field from the W-2 Information Page to two responses to the two new questions: “Are there any pre-eligibility requirements?” (Yes/No) and “Have the pre-eligibility requirements been met?” (Yes/No/?), on the W-2 Pre-Eligibility Requirements page. The conversion process will use the following criteria:

W-2 Information Page Field	W-2 Pre-Eligibility Requirements Page Fields		
Pre-eligibility Requirements Met?	Are there any pre-eligibility requirements?	Have the pre-eligibility requirements been met?	AG Status
N	Y	N	Fails
Y	Y	Y	Passes
W	N	(blank)	Passes
?	(blank)	(blank)	Pends
Blank	Blank	Blank	Pends

The value of “W – Waived” has been removed as a selection on the new W-2 Pre-Eligibility Requirements Page. If “W – Waived” was the response on the W-2 Information Page in CWW, conversion assumes that there were no pre-eligibility requirements assigned.

If the Pre-Eligibility Requirements Met field is either blank or “?” at the time of conversion, the W-2 AG will pend until the W-2 Pre-Eligibility Requirements Page has been completed.

During testing of the conversion process in the Move Placements project, it was discovered that there are some old cases with no W-2 eligibility and with the "Pre-eligibility Requirements Met" information completed but no W-2 End Date on the W-2 Information Page. Without an End Month on the W-2 Pre-eligibility Requirements Page, a new set of pre-eligibility requirements cannot be established if the family should reapply for W-2. In order to correct this issue, an End Month of 05/2006 will be entered by the conversion process.

CREATING WPWW (WISCONSIN WORKS INFORMATION) IN WORK PROGRAMS

In addition to creating the new W-2 Pre-Eligibility Requirements Page, the conversion process will convert confirmed (from AGECE) placement information from the W-2 Information Page to the new WPWW screen (Wisconsin Works Information) in the Work Programs subsystem.

WPWW Screen

WPWW	WISCONSIN WORKS INFORMATION	05/02/06 10:15
CASE: 7700387273		XCT548 P JANSSEN
LAST UPDATED: 01 10 06		
DC: ____	SEQ NUM: 003	
CASE MANAGER: PWR993	FEP-ID: XCT548	PRIMARY WORKER: XCT548
INITIAL W-2 ELIGIBILITY DATE: 01 04 2006		
W-2 BEGIN DATE: 01 10 2006	W-2 END DATE: ____	
PARTICIPANT PIN: 7100801664		
NAME: AILEEN	JOHNSON	
PLACEMENT: CSJ FULL COMMUNITY SERVICE JOB		
PLACEMENT BEGIN DATE: 01 10 2006	PLACEMENT END DATE:	
-----INDIVIDUALS ELIGIBLE FOR PLACEMENT-----		
NAME: AILEEN	JOHNSON	PIN: 7100801664
NAME: STEVEN	JOHNSON	PIN: 7100801672
PF13 NEW EPISODE		
NEXT TRAN: ____	PARMS: 7700387273	MORE...

For each case and W-2 episode, the conversion process will look at the current information on the W-2 Information Page and will check to see whether eligibility was run and the W-2 AG was confirmed on AGECE. If eligibility was both run and the W-2 AG was confirmed, it will keep the information and convert it to WPWW. If not, it will delete the information (and associated payment if applicable) and write it to a report. Please refer to the reports section later in this memo.

Example 2: A participant was placed in a CSJ on 4/3. The FEP ran eligibility and confirmed the W-2 AG. When conversion runs for this case, it creates a CSJ placement on WPWW with 4/3/06 as the Placement Begin Date.

If the current information is deleted, the conversion process will look at the next most recent information on the W-2 Information Page until it finds information that has been confirmed on AGECE. It will consider this information to be current and will display it as the current record on WPWW. If there is a Placement End Date on this record, the Placement End Date will be removed. The process will only look back up to two months (i.e., April and May 2006) for confirmed information. This is to prevent opening up placement information (and potential payments) on cases that have closed in the past but had an unconfirmed record at the time of conversion.

Example 3: A participant has been in a CSJ for several months. On 5/25, the FEP places the participant in CMF, which automatically end dates the CSJ placement as of 5/24. The FEP does not run eligibility or confirm the placement. When the conversion process runs, it deletes the CMF information, writes the CMF information to the report and continues checking for a confirmed placement. Conversion finds the previous CSJ placement and creates WPWW with this information. The placement is not end dated and payment will continue until the CMF placement is re-entered on WPWW.

If a W-2 episode has been end dated by a CARES batch process, such as time limit expiration, the process will keep the W-2 End Date that was entered automatically by CARES.

Example 4: A participant has used 23 months of CSJ. On May 31, the clock cycle runs to tick the CSJ clock at 24 months. A CSJ extension has not been entered and CARES automatically enters the W-2 End Date as 5/31. On June 2, the conversion process runs and keeps the W-2 End Date as 5/31 on WPWW.

Exception: There is one situation when the data on the W-2 Information Page will not convert to WPWW or write to a conversion report due to CARES processing procedures.

A FEP makes a placement change but does not run eligibility and confirm the W-2 AG. A couple of days later, the FEP makes another placement change and runs eligibility and confirms the W-2 AG. The previous unconfirmed placement is lost.

Example 5: On Monday, the FEP places the participant in a CSJ on the W-2 Information Page but does not run eligibility or confirm the W-2 AG. On Friday, the FEP receives information that prompts a change in the placement to W-2 T. The FEP makes the placement change, runs eligibility and confirms the W-2 AG. When conversion runs, WPWW is created with the W-2 T placement as of Friday's Placement Begin Date. The previous unconfirmed CSJ placement is lost.

CREATING ACCURATE WORK PROGRAMS (WP) REFERRAL INFORMATION

The conversion process will check that accurate information exists in WP for each individual who is in a confirmed placement on the W-2 Information Page. If a referral was never created because AIWP was not processed, the conversion process creates a referral based on the most recently confirmed placement. The conversion process will perform the same actions to create the referral as if the worker were processing AIWP online (such as creating the WP individual, creating a pending referral, generating the "Welcome to Work Programs" letter, and setting alerts.) All new or modified Work Programs individuals or pending referrals will be written to reports.

Example 6: A participant is enrolled as Mandatory in FSET. The FEP places the participant in a CSJ, runs eligibility and confirms the W-2 AG, but does not process the referral on AIWP. The conversion process finds the confirmed CSJ placement, determines the participant is Mandatory for W-2, and creates a pending referral for W-2. This will be written to a conversion report and the existing worker will receive the alert "FSET TO WW TRANSFER."

Example 7: A participant was open for W-2 and enrolled in Work Programs in Lincoln County. Prior to conversion, the participant moved to Dane County. The eligibility case was transferred to the new agency, but the Work Program case was still open with the old agency. The conversion process finds a confirmed W-2 placement in a different county than the Work Program information. Conversion creates a pending referral to the new W-2 office and sends a county transfer alert to the previous case manager. The participant will not receive the AE01 "Welcome to Work Programs" letter in this instance.

The conversion program will also create referrals for those individuals who were previously exempt since they are in a case management only placement on the W-2 Information Page and were not previously referred as a WP individual. These individuals will now be referred to WP as Voluntary.

Example 8: A participant has been in a CMS and listed as Exempt on AIWP. During the conversion process, CARES will create a referral for the participant with a Voluntary status. The participant will be created as a Work Programs individual and will receive the AE01 "Welcome to Work Programs" letter.

The conversion process also will run for Learnfare children. If the participant was placed in a paid placement prior to conversion, the student(s) is not in good standing on AILW, and AIWP was not processed, the conversion program creates the referral and sends the notice to the participant.

If the existing referral information is correct, no changes are made.

AGENCY PREPARATION FOR CONVERSION

In order to prepare for the conversion that will run on the weekend of June 2, agencies should do the following:

1. Prior to conversion, FEPs must run eligibility, confirm the W-2 AG and process AIWP on any case where a placement change is made on the W-2 Information Page.

In order to ensure that the correct placement and payment information is populated on WPWW, these steps must occur before **5:00 PM on June 2, 2006**. In addition, there are new backdating rules for WPWW that will be implemented with the Move Placements Project. Details regarding the new rules will be issued in a separate Operations Memo. Please be aware that if you need to re-enter placement information on WPWW because the placement change was not confirmed on AGECE, you may not be able to backdate a placement to when the placement actually started. This may also affect payments.

Example 9: A participant is currently in a CSJ placement on the W-2 Information Page. On 5/25 the participant reports that he/she is starting a new job. The FEP enters the CMF placement on 5/25 but does not run eligibility or confirm the placement change. On 6/2 the conversion program runs. The CMF placement will be deleted and written to the report. On 6/5, the FEP enters the CMF placement again on WPWW. With the new placement rules, the CMF placement can only be backdated to 5/26, not 5/25. The participant will be issued one extra day of payment.

2. Review the status of intake and review appointments. Do not schedule intake or review appointments on June 1 or 2.

In order to facilitate having all of your W-2 cases processed by the evening of June 2, try to complete all intakes and reviews prior to June 2, 2006. You can use the Automated Case Directory report #09 – Review Month Listing by Primary Worker or report #09-F – Review Month Listing by FEP to see which of your W-2 cases are due for review in May and to check the status of the review.

3. Review the cases listed on the “Deleted Unconfirmed Payment” report (please refer to the reports section below for more details) to see if there are cases with an unconfirmed payment amount.

In order to help agencies prepare their cases for conversion, the “Deleted Unconfirmed Payment” report will be run several times throughout the Month of May to give agencies time to prepare their cases for the conversion process. This report will be generated on the evenings of May 15th, May 22nd and May 25th. The report will be sent to the Regional Offices the following morning to be distributed to the local agencies. The report will list any W-2 cases where there is an existing payment amount that has not been confirmed. This report will be issued again after the conversion process has run on the weekend of June 2.

CONVERSION REPORTS

On June 5, 2006, the Regional Offices will receive and distribute a number of reports, as Excel spreadsheets, that will be generated from the conversion process. The purpose of each report is described below. Specific information about the reports, including guidance on actions that should be taken on cases in each report will be provided with the reports. The reports generated will be used to help track what happened as a result of conversion as well as to process cases.

DELETED / MODIFIED PLACEMENT INFORMATION

This report will list the placement information either deleted or modified from the W-2 Information Page. Workers should use this report to identify when placement information needs to be entered or changed on WPWW.

DELETED UNCONFIRMED PAYMENT

This report will list all outstanding payments that were deleted due to an unconfirmed placement from the W-2 Information Page. Any case listed on this report will also be included on the Deleted / Modified Placement Information Report.

FEP ID MISMATCH

When conversion runs, part of the process compares the “FEP ID” on the W-2 Pre-Eligibility Requirements Page with WPWW. If the IDs do not match, that information is displayed on this report.

INDIVIDUALS REFERRED TO WORK PROGRAMS (WP)

This report lists individuals who were referred to WP during the conversion process. These individuals were not previously referred to WP because they were either Exempt or AIWP was never processed.

PENDING REFERRALS CREATED

This report lists individuals who were referred to WP during the conversion process. These individuals had a prior referral and were open in a WP office. However, prior to conversion, a placement change was made and confirmed and the new referral was not processed at that time.

UPDATES TO WORK PROGRAM INDIVIDUAL INFORMATION

This report lists individuals for whom CARES created WPWI during the conversion process due to a referral change.

W-2 BEGINS TRANSACTIONS CREATED

This report lists individuals who were open in WP for Children First and are now opening in W-2. These individuals have a confirmed placement on the W-2 Information Page, but AIWP was not processed to generate the referral. In addition to this report, the Case Manager and FEP will receive an alert and the participant will receive the AE01 "Welcome to Work Programs" letter.

CONTACTS

BHCE CARES Information & Problem Resolution Center

Program Categories – FS – FoodShare, MA – Medicaid, SC – Senior Care, CTS – Caretaker Supplement, CC – Child Care, W-2 – Wisconsin Works, FSET – Food Stamp Employment and Training, CF – Children First, EA – Emergency Assistance, JAL – Job Access Loan, JC - Job Center Programs, RAP – Refugee Assistance Program, WIA – Workforce Investment Act, Other EP – Other Employment Programs.

DWD/DWS/BWP/TEJ
DWD/DWS/BW-2/JK